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Canadian Manufacturing Activity: A Geographic Perspective

Manufacturing Construction and Energy & Geography Divisions

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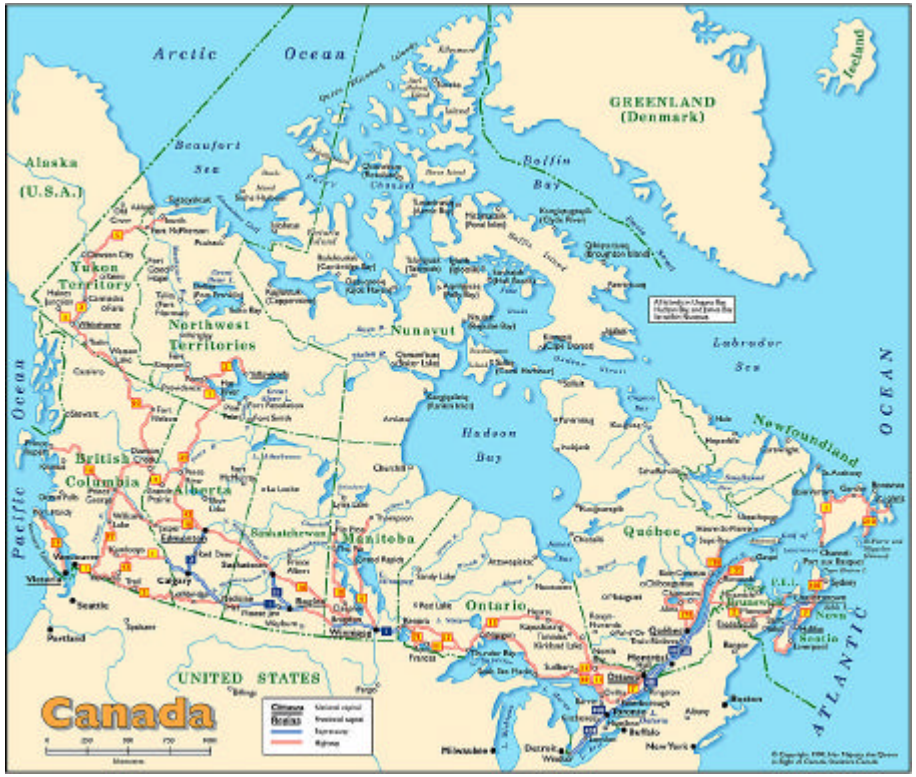

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Canadian Manufacturing Activity: A Geographic Perspective

This document is the result of an initiative struck between the Manufacturing, Construction, and Energy Division and Geography Division to highlight the spatial dimension of the Annual Survey of Manufactures data. There are two maps in this document presenting the predominant manufacturing activity by census division (CD) for 1983 and 1997, which form the basis of this analysis. Using specific manufacturing industry groupings, both maps highlight the single dominant manufacturing activity in a census division. The predominant manufacturing activity in a census division does not necessarily represent the majority activity in that region. The coloured areas on the map that correspond to an industry grouping represent the population ecumene. These manufacturing industry groupings were chosen to reflect similar industrial activity and to ensure the confidentiality of our respondents. Direct census division comparisons, in some instances between the two maps, should be made very carefully because the cartographic projections are different, the census boundaries have changed, and the technologies that produced these maps differ.

In broad brush strokes, this map shows the range and variety of manufacturing in Canada. Between the green of British Columbia and New Brunswick there is a fringe of green along the south end of the Canadian Shield - the green indicates areas where wood and paper manufacturing are important. Golden brown - evocative of ripe wheat - suggests the importance of the food and beverage industries in the Prairies and Atlantic Canada. Southern Ontario's predominant blue reflects the significance of transportation equipment and related industries. The patchwork quilt pattern in Southern Québec illustrates the diversity of Québec's economy. The islands of light brown in southwestern Ontario's Lambton County and in central Alberta indicate areas where the chemical and petrochemical industries are major players.

This document presents economic highlights of Canada's regions using data from the Annual Survey of Manufactures and other Statistics Canada publications.

Manufacturing Industries: The Atlantic Provinces

There is a tendency in the Canadian economic literature to treat the Atlantic provinces as one entity that is economically homogenous. Unfortunately, this perspective masks much of the economic diversity that typifies this geographic region. The four Atlantic provinces are economically quite diverse among themselves, as alluded below.

Both in 1983 and 1997, the food, beverage, and wood related industries dominated Newfoundland's industrial landscape. Much of the activity for the food industry is dotted along the coast, reflecting the historical significance of the fishing and food processing industries to the province. In 1997, the food and beverage industries accounted for 37% of the province's total shipments. Since 1994, the provincial population has steadily declined, and by 1997 there were 554,076 inhabitants on the island. Many of the migrants, who left Newfoundland, went in search of better economic prospects elsewhere. Interestingly, the total number of manufacturing employees has increased in recent years, and in 1997 the number of production workers increased 9.1%. The number of production workers in the food and wood industries increased 9.8% and 12.5% in 1997 respectively. On average, manufacturing wages tend to be higher than those found in the services and agricultural sectors. In 1997, there was an average wage increase of 7.5% to $14.62 per hour in the manufacturing sector.

Even though red soil and spuds evoke the landscape of Prince Edward Island, the fish products industry accounts for almost half of the establishments and production employees in the food industry. This is quite significant given that the food processing industry accounts for almost two-thirds of this province's industrial activity. Overall, the fish products industry accounts for 30.2% of the shipments in the food industry, or $158.7 million. The wood products and the transportation equipment industries are two other notable manufacturing sectors. They experienced dramatic increases of 90.6% and 41.5% respectively in the value of shipments in 1997. These increases are partially attributed to the construction of the Confederation Bridge, which opened in June 1997.

There were only a few changes between 1983 and 1997 in terms of the predominant manufacturing activity in particular census divisions in Nova Scotia. Unlike Newfoundland and PEI where there were no perceptible changes between the two maps, there were evident changes in certain census divisions in Cape Breton and in the Halifax region. In comparing the two maps, the food, beverage and tobacco, and the machinery, transportation equipment and electrical products industrial clusters have increased in number. In 1997, the food, transportation equipment, and paper and allied products industries produced the largest value of shipments. Combined, these industries employed 48.7% of the total manufacturing sector production workers, and paid hourly wages of $10.55, $16.31, and $23.04 respectively. These wages should be noted in comparison to the total manufacturing provincial average wage of $14.28 per hour. In the Halifax County census division, the transportation equipment industry was one of the most predominant industries. And even though in 1997 there was a 9.9% decline in this industry's value of shipments, it still contributed about 4% to the provincial GDP, which is quite significant for one industry. Finally, the Sable Island natural gas project sparked considerable growth in the fabricated metal products industry due to the construction of rigs, pipelines and gas processing plants. In 1997, this group's value of shipments increased by 25.1% to $196.8 million.

New Brunswick could be considered one big forest, given that almost 85% of the province's total space is covered by inventoried forest land. The significance of this natural resource cannot be underestimated because in 1996, 10.2% of the provincial gross domestic product originated from logging and forestry, wood, and paper and allied products industrial activities, compared with only 6.9% in 1984. The paper and allied products industry produced the greatest value of shipments for a single industry of $1.9 billion in 1997, and accounted for 22.3% of the province's total manufacturing shipments. It appears from examining both maps that the wood, furniture, and paper, and food, beverage and tobacco industries form the core of the provincial manufacturing sector, and little has changed with respect to this. However, in 1997 the Saint-John County census division changed from food to rubber and plastics, petroleum products, and chemical products industries as the predominant manufacturing activity. During the 1990s, there was an explosion in the number of call centres that located in New Brunswick, due partially to investments in upgrading the telecommunication system infrastructure. This activity may have contributed to increases in some sub-groups of Major Group 33 - Electrical and electronic products industries, in which a very significant increase in the value of manufacturing shipments occurred.

Halifax is the largest city and economic centre in Atlantic Canada. In 1997, there were approximately 345,300 inhabitants in the city, while there were only 127,900 residents in Saint-John, NB, although manufacturing played a more significant role in the economy of the latter city on the Bay of Fundy. In 1997, the manufacturing industries located in the municipality of Saint-John produced goods with a value of shipments near $3.4 billion. This is an impressive figure when compared to the municipality of Halifax, or even Vancouver which is considerably more populated and only produced shipments totalling $3.9 billion in 1997. The manufacturing establishments in Saint-John employed 4,397 production and administrative workers, and the average hourly production wage was approximately $18.00. These figures convey the importance of manufacturing to this urban and provincial economy, especially given that establishments located in Saint-John accounted for 46% of the total provincial shipments. The total value of manufacturing shipments for New Brunswick amounted to $8.4 billion in 1997.

Manufacturing Industries: Québec

The majority of Québec's residents live near the shores of the St. Lawrence River, and it is in this region where the most significant portion of manufacturing activity occurs. In 1997, the provincial value of shipments totalled $102.8 billion, and accounted for almost 25% of all Canada's total manufacturing shipments. The top three industries in the province were the food, transportation equipment, and paper and allied products industries. These industries are well represented on both maps. Of all the provinces, it is in Québec where the most diversified manufacturing activity occurs, which is reflected on the two maps. This tapestry of industries is best viewed in the map inset that magnifies the region extending from the Outaouais region to île d'Orléans near Québec City. In the Estrie region southeast of Montréal, the predominance of the primary textile, textile products and clothing industries is prevalent. This group of industries, which is most prominent in the province of Québec, produced a value of shipments of approximately $7.9 billion, and employed nearly 60,000 production workers in 1997. Of note is the change on the island of Montréal from clothing and textile to the machinery, transportation and electrical products industries. This reflects the productive growth of the aerospace and machinery industries that serve the primary sector. Between 1983 and 1997, the aircraft and aircraft parts industry has increased its value of shipments by 160.2% in constant dollar terms. This increase is quite significant since the number of establishments has remained almost unchanged, which points to the growing importance of this industry in this urban region. The Other Machinery and Equipment Industries which is also significant to the island increased its constant dollar value of shipments by 129.3% and its total number of production workers by 47.6% between 1983 and 1997. Even though the significance of the clothing and textile industries has declined, it still remains a very important employer in Montréal.

Based on the 1996 census, the city of Montréal had a net inflow of 70,755 migrants from across Canada and around the world increasing the population to 3,408,900 inhabitants. The metropolitan region of Montréal made up 46.4% of the provincial population in 1997, hence making the city an important contributor to the provincial economy. In 1997, manufacturing establishments injected over $2.3 billion in salaries and wages into the economy, and produced $12.3 billion worth of goods. In the municipality of Montréal the average hourly wage for all manufacturing industries in 1997 was $13.18, while the provincial average (including Montréal) was $15.37.

Manufacturing Industries: Ontario

With 11.3 million people in 1997, Ontario is the most populous province with 37.7% of Canada's population. This province has the largest economy, and one indicator of its recent buoyancy is the sharp increase of 6.4% in 1997 in personal expenditures on consumer goods and services. In this same year, the province's manufacturing establishments produced $228.5 billion in shipments representing 52.6% of the total Canadian value of shipments. These figures are not surprising when one considers that 14 of the top 20 municipalities ranked by the value of manufacturing shipments originated in Ontario. Both maps highlight the major extent of this economic activity occurring in the southern part of the province between Windsor and Cornwall, extending northward to North Bay and Sudbury. Manufacturing establishments were located in 535 of Ontario's 947 census subdivisions.

The Transportation Equipment Industry produced the greatest value of shipments ($81 billion) of the province in 1997, accounting for 84.3% of the total Canadian Transportation Equipment Industry. This is clearly depicted on the map with the predominance of blue in southwestern part of the province. Ontario's strategic location near Michigan and Ohio - the centre of the United States' automotive industry - provides one explanation as to why most of the major auto-parts and automobile assembly plants have historically located in this part of the province. Even though there have been some changes to the census division boundaries between 1983 to 1997, there have been only a few changes in the predominant manufacturing activity, most noticeably in central and eastern Ontario.

Toronto remains the centre of economic activity in Canada, much like Montréal did in the first half of the twentieth century. Historically, the presence of head office operations has been one indicator of a city's economic prominence. In 1983, there were 265,109 production, administrative and head office employees in the Metropolitan Toronto, which included the municipalities of East York, Etobicoke, North York, Scarborough, Toronto, and York. The total wages and salaries totalled approximately $9 billion in constant dollars, compared to $7.6 billion in 1997, with only 215,834 employees. When the number of head office employees in relation to the over total is examined, some interesting details come to light. In 1983, there were 31,492 head office, sales offices and ancillary unit employees comprising 11.9% of the total employees. This diminished substantially in 1997, when the head office employees comprised only 6.9% of the total manufacturing workforce in the Greater Toronto Area. This decrease in total employment and head office employees points to some of the following trends: mergers and acquisitions of head office and plant operations, the downsizing of production and administrative staff most noticeably in the head offices, and the migration of head office and manufacturing activity to other municipalities outside of Metropolitan Toronto.

Manufacturing Industries: Manitoba and Saskatchewan

Manitoba is defined by more than its landscape. With shipments of nearly $10 billion in 1997, the economy is in a period of robust expansion. From 1994 - 1996, the provincial gross domestic product increased 4% annually, and in 1997 shipments increased 11% over 1996 levels. In 1997, manufacturing activity occurred in 92 of the provinces 298 census sub-divisions. The municipality of Winnipeg was by far the most significant contributor. Almost 60% of Manitoba's inhabitants live in Winnipeg, and this central metropolitan area accounted for 71.5% of the province's establishments and 69.3% of its total manufacturing shipments. Winnipeg has one of Canada's largest cluster of aerospace manufacturers. There are eleven aircraft and aircraft parts producers in the province which accounted for shipments in excess of $540 million. Agriculture is an important industry to the province, however it also exerts a strong influence on the machinery industry. Of the 67 establishments in this industry, almost half of them are in the Agricultural Implement Industry sub-group. This industrial sector generated shipments of $1.1 billion in 1997, an increase of 18% over the previous year. Another industry that plays an integral role in Winnipeg is the clothing industry. Even though most clothing manufacturers are located in Québec, this industry still made up approximately 4.7% of the Canadian clothing shipments in 1997. A close examination of the 1997 map reveals that certain census divisions did not report any form of industrial activity. These non-manufacturing census divisions are located in the far north and around Lake Winnipeg. In Manitoba the food and machinery industries predominate the landscape, which are dotted with wood, primary metal and metal fabricating industries.

All too often, economic portrayals of Saskatchewan describe it as if agriculture formed the backbone of the economy. This is misleading given that agriculture and related activities accounted for only 10.1% of the provincial gross domestic product in 1984, only to increase slightly to 11% in 1996. Since this prairie province produces grain and livestock, it is no surprise that meat and meat products and the feed industries account for much of the food industry's value of shipments, which accounted for 25% of the provincial total. In 1983, the food industries accounted for 31% of the total manufacturing shipments, however this level has never been attained since. Other industries have emerged to fill this void, such as the plastic products, wood, machinery, transportation equipment and chemical industries. Combined, these five industries equalled 28.3% of manufacturing shipments in 1997, compared with a lesser value in 1983. The diversity of the Saskatchewan's industrial activity is captured well on the 1997 map. Of the 787 establishments that were surveyed in the province, 154 of them were located in the capital city of Regina. This central metropolitan area had a population of 199,100 in 1997, and its establishments produced $1.7 billion worth of shipments. Saskatchewan has the lowest proportion of census subdivisions with manufacturing activity. In 1997, only 145 of the total 970 census sub-divisions had establishments which reported any manufacturing activity.

Manufacturing Industries: Alberta

Alberta has one of the most robust provincial economies in Canada. Two indicators pointing to this region's economic prosperity are the small percentage (2.4%) of manufacturing bankruptcies as a proportion of the Canadian total; and the private and public capital expenditures increased (35%) in 1997 to almost $28.8 billion. This substantial jump was only exceeded by Saskatchewan.

In 1997, the total value of shipments increased to 11.6% over 1996 to $34.8 billion, which is approximately 8% of Canada's total value of shipments. The top three industries ranked by shipments were food, chemical and chemical products, and refined petroleum and coal products. This is unsurprising for Alberta, where oil and gas revenues contribute a substantial portion to the provincial coffers. All the aforementioned industries are illustrated on the 1997 map, as well as wood and transportation industries, which have grown considerably since 1983. When comparing the two maps, it appears that in 1983 the wood industries were more significant than in 1997. The numbers, however, paint another picture as shown in Table 1. In current dollars the wood industry grew by 136% from 1983, and represented 5.1% of the total manufacturing shipments, versus 3.8% in 1983. On the other hand, the refined petroleum and coal product industry increased its shipments by 35%, while the percentage this industry represented of the total manufacturing shipments declined to 14.8% from 19.5% in 1983.

Table 1. Value of shipments for selected industries in Alberta, 1983 and 1997 (1992=100)

Industry	Shipments 1983	Shipments 1997	Change%
All Manufacturing Industries	$16,371,506,478	$29,017,293,724	77.24%
Refined Petroleum and Coal Products Industries	$3,188,281,147	$4,290,407,567	34.57%
Wood Industries	$623,170,153	$1,473,685,056	136.48%

Source: Statistics Canada, Manufacturing, Construction and Energy Division, Annual Survey of Manufactures

Provincial manufacturing activities are dispersed across rural and urban areas, however they have contributed most significantly to the prosperity of Calgary. This is evident given that in 1997, the province's housing starts increased 45% from 1996, which was the most significant increase in Canada. Calgary's population increased 13.1% between 1995 and 1999, topping off at 933,700 people. This substantial jump is parallelled by the increase in the number of manufacturing establishments; there were 870 establishments in 1983, and 954 in 1997. The value of shipments in 1997 was $8.9 billion, compared with $3.5 billion in 1983. Calgary's manufacturing community is more diverse than Edmonton's. The establishments in the latter city shipped $5.3 billion of goods in 1997, and they are more energy intensive than Calgary's. The ratio of fuel to shipments in Edmonton was 1.8%, while Calgary's was 1%.

Manufacturing Industries: British Columbia

Without a doubt the economy of British Columbia relies heavily on forestry and activities related to wood processing. The wood and paper and allied products industries account for 49.6% of the province's $34.6 billion value of manufacturers' shipments. Consequently, the wood related industries are most predominantly represented on both maps. One emerging industry, however, that is not well represented on the map is the electrical and electronic products industry which experienced significant growth in shipments in 1997 of 16.3% over 1996. Using the four-digit standard industrial classification code, the Electronic computing and peripheral equipment industry ranked in the top 20 industries in terms of value of shipments as shown in Table 2, compared to 109th in 1983. This industry points to the emerging information technology firms locating in the province.

Table 2. Selected top 20 four digit industries ranked by value of shipments in British Columbia, 1997

Rank	SIC	Description	Shipments (millions)
1	2512	Sawmill and Planing Mill Products Industry (Except Shingles and Shakes)	$9,164
2	2711	Pulp Industry	$3,031
3	2712	Newsprint Industry	$1,511
5	2522	Softwood Veneer and Plywood Industry	$910
6	1021	Fish Products Industry	$587
8	1011	Meat and Meat Products Industry (except poultry)	$529
9	2819	Other Commercial Printing Industries	$526
10	1012	Poultry Products Industry	$505
12	1041	Fluid Milk Industry	$450
15	1053	Feed Industry	$413
16	1699	Other Plastic Products Industries n.e.c.	$397
17	3361	Electronic Computing and Peripheral Equipment Industry	$387
20	1131	Brewery Products Industry	$312

Source: Statistics Canada, Manufacturing, Construction and Energy Division, Annual Survey of Manufactures

Manufacturing establishments located in the municipality of Vancouver account for 10.9% of the province's total value of shipments of $3.9 billion. Vancouver is the third largest census metropolitan area in Canada, although in terms of total employment, it is surpassed by smaller centres such as Winnipeg, Edmonton and Calgary. This suggests that the manufacturing industries play less of a direct role in the economy of this city. Manufacturing activity occurred in only 186 of the province's 713 census subdivisions because of its coastal and mountain regions.

Methodology and Technical Aspects

The enclosed maps provide another medium to present data from the Annual Survey of Manufactures. The brief text summaries were included to highlight and contextualize the relevant socio-economic factors concerning the manufacturing activity in these regions. The following information outlines the technical specifications of the maps and data used to produce them.

Base map: the geographical area covered is Canada, and the census divisions, provincial and international boundaries are drawn on the map with distinctive dashed lines. When comparing the 1983 and 1997 maps, it is important to note that the census boundaries have changed during this period, and consequently, direct comparisons must be made carefully. There have been significant census division changes in Ontario and Québec. In order to facilitate reading the maps, certain details such as provincial, territorial, and city names were not included.

Census Division (CD): this is the general term applied to areas established by provincial law which are intermediate geographic areas between the municipality (census subdivision) and the province level. Census divisions represent counties, regional districts, regional municipalities, and other types of provincially legislated areas. In Newfoundland, Manitoba, Saskatchewan and Alberta, provincial law does not provide for these administrative geographic areas. In this case Statistics Canada has created census divisions in cooperation with these provinces for the dissemination of statistical data. In the Yukon Territory, the census division is equivalent to the entire territory.

Census metropolitan area (CMA): this is a very large urban area (known as the urban core) together with adjacent urban and rural areas (known as urban and rural fringes) that have a high degree of social and economic integration with the urban core. A CMA has an urban core population of at least 100,000, based on the previous census. Once an area becomes a CMA, it is retained as a CMA even if the population of its urban core declines below 100,000. All CMAs are subdivided into census tracts. A CMA may be consolidated with adjacent ***census agglomerations*** (CAs) if they are socially and economically integrated. This new grouping is known as a ***consolidated CMA*** and the component CMA and CA(s) are known as the ***primary census metropolitan area*** *(PCMA)* and ***primary census agglomeration(s)*** *[PCA(s)*]. A CMA may not be consolidated with another CMA. Census metropolitan areas, census agglomerations (CA), consolidated census metropolitan areas, consolidated census agglomerations, primary census metropolitan areas (PCMA) and primary census agglomerations (PCA) are delineated using the same conceptual base. Metropolitan area is a general term for all these areas. Non-metropolitan area is a term for all areas outside of the metropolitan area.

Census subdivision: this is the general term applying to municipalities (as determined by provincial legislation) or their equivalent (for example, Indian reserves, Indian settlements and unorganized territories). In Newfoundland, Nova Scotia and British Columbia, the term also describes geographic areas that have been created by Statistics Canada in cooperation with the provinces as equivalents for municipalities for the dissemination of statistical data.

Employment: employment statistics have been calculated using data from the Annual Survey of Manufactures and Canadian Price Index.

Population: population polygons were obtained from the 1996 Population Census. Even though the territory of Nunavut was not a political entity at the time of the 1996 Census, it has been subsequently added to reflect a recent change to Canada's political geography. The manufacturing activity data are shown only for areas that fall within the 1996 ecumene. The population ecumene includes all areas with a population density greater than 0.4 persons per square kilometer. The ecumene is a geographical term that delineates the inhabited land. Generally, it refers to the space where people have a permanent residence, and to all work areas that are considered occupied and used for agricultural or any other economic purposes. Thus, there can be various types of ecumenes, each having their own unique characteristics (such as population ecumene, agricultural ecumene, industrial ecumene, etc.).

Predominant Manufacturing Activity: the predominant manufacturing activity was calculated based on the percentage of shares of the value of shipments of goods of own manufacture, total value added and total number of employees for each census division. In the province of Manitoba, there are a few central and northern census divisions that exhibit no manufacturing activity in the inhabited areas. Otherwise, all the inhabited areas are assigned a colour to represent the single manufacturing grouping which predominates over each other activity. This does not mean that the predominant activity represents 51% of the manufacturing activity in an area. Additionally, within census divisions, there will be certain inhabited areas which have no industrial base for the activity characterized by the entire census division. The colour of the manufacturing activity reflects the predominant activity of a census division and not necessarily all the settlements shown within the division.

Total Inventoried Forest Land: These are spaces primarily intended for growing, or currently supporting forests. This includes productive forest land and reserved forest land not available by law for production.

Treatment of Head Offices, Sales Offices, and Ancillary Units: It should be noted that head offices, etc., are included in national and provincial industry statistics, but are excluded from all sub-provincial manufacturing data. At the national and provincial level, such units are included in the individual industry of the company's largest activity and the effect on the data is very small. At the sub-provincial level, however, the effects of such inclusions are considered serious enough to warrant special treatment. For example, since head offices of large multi-unit firms with Canada-wide operations tend to be located in the large metropolitan areas such as Toronto and Montréal, industry statistics for these centres would be overloaded with expenses relative to revenue and this would distort inter-city or inter-area comparisons of manufacturing activity.

Value of Shipments: value of shipments of goods of own manufacture figures are aggregates which are derived from the Annual Survey of Manufactures, issued from the Manufacturing, Construction and Energy Division. The data were mapped at the census division level, after the application of industry aggregation and confidentiality rules.

For more information, contact Jean-Marie Houle (613) 951-9497, Bruno Pépin (613) 951-3529, or manufact@statcan.ca

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